









MiScorecard Performance Summary								
Business Unit:		Department of Treasury		<div>Green</div> <div>Yellow</div> <div>Red</div>				
Executive/Director Name:		Rachael Eubanks		<div>&gt;=90% of target</div> <div>&gt;= 75% - 90% of target</div> <div>&lt;75% of target</div>				
Reporting Period:		Apr 2019		Date Approved: 5/13/2019				
Metric ID	Metric	Status	Progress	Target	Current	Previous	Frequency	Metric Definition
<b>Customer/Constituent</b>								
CSB-6	Customer Service - First Contact Resolution Rate (Contractor)- % of Calls Resolved on First Contact	Yellow		95%	77% 2019, March	75%	Monthly	The third-party collections contractor has a contractual target to provide debtors with contact resolution at the point of first contact. Contact Resolution is defined as the reasonable attempt to resolve 'an immediate' account issue through education and/or some action. The primary goal is to increase the overall percentage of first contact resolution for sampled calls. In an effort to increase customer service throughout the Collection Services Bureau, it is important that the third-party collections contractor is able to provide helpful and accurate information to taxpayers. A higher percentage rate means that more taxpayers were able to be assisted correctly during their first contact with our third-party contractors. Data has a lag time of 1 month.
TASB-10	IIT - Individual Income Tax Returns - % processed in same year as received.	Green		100.0%	93.3% 2019, April	93.4%	Monthly	Processing Individual Income Tax (IIT) returns in the year they are filed provides better customer service and reduces phone calls and correspondence. A higher percentage represents (more) returns processed year to date.
TASB-15	IIT - All Individual Income Tax Correspondence Processed Within 60 Days - % Timely	Green		90.0%	98.2% 2019, April	99.4%	Monthly	Processing Individual Income Tax (IIT) correspondence within 60 days of receipt reduces phone calls and provides better customer experience.
TASB-17	SUW - Sales, Use and Withholding Phone call average speed of answer - Average # of Minutes	Green		6.00	5.54 2019, April	5.25	Monthly	Answering phone calls within 6.00 minutes or less improves customer satisfaction as callers questions are answered in a timely manner.
TASB-20	SUW - Sales, Use and Withholding Correspondence processed within 60 days - % Timely	Green		90%	95% 2019, April	90%	Monthly	Processing correspondence within 60 days of being received will result in accurate billings and refunds issued in a timely matter. This improves customer satisfaction as taxpayers are notified of the outcome of their correspondence in a timely manner. In addition, financial records and forecasting for the state are more accurate when correspondence is resolved in a timely manner.
TAXPOL-16	RABs - # of RABs issued annually	Green	=	10	10 CY2018	10	CY Annually	Tax Policy Division is responsible for providing guidance on tax issues to the public (taxpayers, tax practitioners, etc.). Revenue Administrative Bulletins (RABs) are guidance issued by the Bureau of Tax Policy. This metric measures the number of RABs issued annually. A higher number represents overall improvement in providing tax guidance to the public. For purposes of this metric, RABs that update interest rates, tax rates, and education and community foundation certification are excluded.
SFSB - 15	MISSG User Accounts: % Public High Schools with Users	Red		90.00%	55.45% 2019, April	54.81%	Monthly	Having access to Student Scholarships and Grants' Web-based data management solution, MISSG, increases the ability of high school counselors to accurately work with their students' data. High schools that lack user accounts will be at a disadvantage for preparing their students for postsecondary education. Counselors can see which students have completed the Free Application for Federal Student Aid (FAFSA), SAT scores, and Tuition Incentive Program (TIP) applications. The expectation is that all Michigan public high schools will have users with access to MISSG. The measurement period is monthly per academic year (9/1 to 8/31) rather than the standard calendar year (1/1 to 12/31).
SFSB - 13	Class of 2020 TIP Applications - % of Monthly Goal Completed	Green		100.00%	97.44% Academic Year (9/1/18 - 8/31/19)	76.59%	Monthly	The Tuition Incentive Program (TIP) is a State of Michigan student financial aid program that provides tuition assistance for qualifying students who received Medicaid between age 9 and high school completion and completed their TIP applications prior to the deadline at the end of the senior year in high school. Monitoring whether the monthly goal for Class of 2020 was accomplished measures an aspect of the effectiveness of the Outreach efforts provided by the Student Financial Services Bureau (SFSB) to students prior to their senior year in high school. SFSB wants to shift focus from almost exclusively high school seniors to also include freshmen, sophomores, and juniors. An increasing number of students who complete the application prior to beginning their senior year helps to show that Outreach efforts to pre-seniors are succeeding. Additionally, if only small increases or even a decrease is noted at the end of the year, then activities should be reevaluated and focus shifted to different strategies, whereas if the increases are significant, efforts should be sustained and expanded. This is a monthly metric based on the academic year from September 1 through August 31. SFSB's goal is to have more students complete their application prior to their senior year this academic year than did in the previous academic year (at least 9,499 students). To reach this goal, there is a minimum number of applications that must be completed each month. This metric shows how many Class of 2020 TIP applications are completed in a month, relative to the monthly minimum."
<b>Internal Business Process</b>								
TCB - 3	Average Days to Complete a PA3 Audit with no taxpayer-requested Waiver or Request for Reconsideration - # Days	Green		200	207 2019, April	194	Monthly	An average of the days to complete a PA3 audit (Field Audit and Audit Processing) for audits completed in the month, where the taxpayer has not requested an extension of time (Waiver or Request for Reconsideration). Monitoring the Average Days to Complete helps to ensure that TCB provides each taxpayer with the best customer service possible. Efficient and timely completion of an audit helps to minimize the impact of the audit process on the taxpayer.

								Efficient use of time by the audit staff will also lead to the identification of more instances of non-compliance which in turn will level the playing field for all taxpayers. The measurement starts when the auditor begins the audit and ends when the Final Audit Determination letter (FAD) is issued to the taxpayer.
TCB-16	Average Quality Assurance (QA) score of randomly selected field audits sent to TCB Processing in the previous month - % Quality Score	Green	=	95%	94% 2019, March	94%	Monthly	An average of the monthly quality assurance (QA) review scores of randomly selected field audits sent to TCB Processing will be measured to ensure that procedures and policies are consistently followed in the audit process. Scores will be used to identify areas of miscommunication, so management can determine what type of training and/or guidance is needed to improve compliance. Data has a lag time of one month.
TCB-22	Suspicious filer correspondence processed within 60 days of receipt - % Processed	Green		95%	99% 2019, April	98%	Monthly	Percent of suspicious filer correspondence completed within 60 days of receipt. The purpose of this metric is to strive for strong taxpayer customer service by completing correspondence and releasing tax returns for normal processing quickly. Success in this metric reduces taxpayer phone calls, hardship request and improves the relationship between taxpayers and the department.
TCB-23	IRS correspondence processed within 60 days of receipt - % Processed	Green		95%	94% 2019, April	100%	Monthly	Percent of IRS correspondence completed within 60 days of receipt. The purpose of this metric is to strive for strong taxpayer customer service by completing correspondence and reviewing tax returns for prior years. Internal success in this metric reduces taxpayer phone calls for the unit and call center, and improves the relationship between taxpayers and the department.
TCB-24	Discovery correspondence processed within 30 days of receipt - % Processed <sup>1</sup>	Green		95%	97% 2019, April	99%	Monthly	The percentage of correspondence completed within 30 days of receipt ensures a speedy response and improves taxpayer service.
TCBMSP-1	Inspections of Tobacco Retailers	Green		470	1004 2019, FYQ2	1062	Quarterly	This measures the number of administrative inspections of tobacco retailers and licensees by MSP and Treasury enforcement personnel each quarter.
<b>Learning and Growth</b>								
I&D-1	Professional Development - Staff Participation - % of Staff in Attendance at Professional Development Events	Green		60%	95% 2019, CYQ2	59%	Quarterly	This metric will identify the percentage of Treasury employees participating in professional development events. These events include Treasury Resume Review, Treasury Mock Interviews, and the Meet & Greet event. Providing these events offers opportunities for staff to grow professional skills in the work place. A higher current value indicates greater participation, demonstrating increased exposure to professional development skills. Target value is representative of average participation per all events held for the quarter. This metric measures the average rate at which available seats are being occupied by Treasury employees. New metric September 2018, data will be provided once baseline is established.
I&D-2	Cultural Awareness and Education- Staff Participation - % of Staff Participation at Cultural Awareness Events	Green		55%	108% 2019, CYQ1	59%	Quarterly	This metric will identify the percentage of Treasury employees participating in cultural awareness events. Events include diverse cultural committees. Participation facilitates awareness and education of diverse counterparts, leading to a more inclusive workplace. The goal is to increase participation rates, indicating more awareness of diversity and increasing inclusion in the workplace. Target value is representative of average participation per all events held for the quarter. This metric measures the number available seats offered against the number of Treasury employees in attendance. New metric September 2018, data will be provided once baseline is established.
EXEC-1	Improve Internal Communication Through Web	Green	=	100%	100% 2019, April	100%	Monthly	Regularly update the Treasury Intranet home page to ensure staff have access to current information. This measures the percentage of time the web is updated at least monthly.
<b>Financial</b>								
ORTA-7	Revenue Estimate - Accuracy - % estimated within actual	Green		3.0%	1.4% CY2018	0.3%	CY Annually	The Office of Revenue and Tax Analysis (ORTA) estimates revenues each year to assist with forecasting and financial planning for the State of Michigan. The target of 3% is in reference to estimate revenues within 3% of actuals. Providing accurate revenue estimates impacts the overall state budget process and allows for better budget planning. A lower current value indicates estimates were closer to actuals.
BSAF-4(a)	State Credit Rating (Fitch)	Yellow	=	AAA	AA FY2018	AA	FY Annually	Ensure the state receives the best credit rating possible. A better credit rating allows the state to borrow money at the most competitive rates available. Ensures the financial position of the state provides a climate for business investment and citizen confidence.
BOI-5	MPSERS Quarterly rolling 7 year average return	Green	=	6.8%	9.8% 2019, FYQ1	9.8%	Quarterly	Actual investment rate of return on pension fund assets for the Michigan Public School Employees' Retirement System vs. Actuarial Target Rate
BOI-51	MPSERS Quarterly rolling 3 year average	Green		6.7%	8.6% 2019, FYQ1	10.9%	Quarterly	Actual investment rate of return on pension fund assets for the Michigan Public School Employees' Retirement System vs. Peer Target Rate
<b>Good Government</b>								
GG2	The percentage of champions identified in employee survey	Green	=	56%	54% 2018 Survey	54%	CY Annually	The % of champions identified in the statewide survey of state employees measuring employee engagement. Current value represents 2017 Employee Engagement Results.

<sup>1</sup> The status color for this metric reflects breaking points at 90% to 100% of the established target value.